

C. Independent Student's Income Information to Be Verified

1. **TAX RETURN FILERS**— complete this section if the student, filed or will file a 2020 income tax return with the IRS. **If no return was filed, skip to question #2.**

Check the box that applies:

- I, the student, **have used** the IRS Data Retrieval Tool on the Web to retrieve and transfer my (and if married, my spouse's) 2020 IRS income information into my FAFSA. *TCNJ will use the IRS information transferred into the student's FAFSA to complete the income verification process.*
- I, the student, **am unable or choose not to** use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school a **2020 IRS tax return transcript—or a photocopy of the "home" income tax return.** *To obtain an IRS tax return transcript, go to www.irs.gov and under the "Tools" tab click on the "Get a tax transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2020 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
- Check here if the IRS tax return transcript(s) is attached to this worksheet.
- Check here if the IRS tax return transcript(s) will be submitted to the school later. Verification cannot be completed until the IRS tax return transcript(s) have been submitted to the school.

Important Note: If you (or your Spouse, if married) filed, or will file, an amended 2020 IRS tax return, then you must submit to the school a 2020 IRS tax return transcript, a copy of the 1040 X tax form and a copy of the corrected tax return

Instructions: *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2020 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers*

2. **TAX RETURN NONFILERS**—complete this section if you, the student (and, if married, your spouse) **will not file and are not required** to file a 2020 income tax return with the IRS.

Check the box that applies:

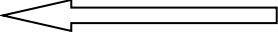
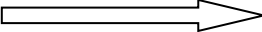
- The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2020. Proceed to Section D.
- The student (and/or the student's spouse if married) was employed in 2020 and has listed below the names of all employers, the amount earned from each employer in 2020, and whether an IRS W-2 form is attached. Attach copies of all 2020 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and Social Security Number at the top.*

Employer's Name	2020 Amount Earned	IRS W-2 Attached?
Suzy's Auto Body Shop (example)	\$2,000.00(example)	Yes(example)

Student's Name: _____ SSN: _____

D. Untaxed Income

**Fill in each box with a \$ amount or "\$0". Blank responses are not acceptable.
Thank you!**

Student	2020 Untaxed Income	Spouse
	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D,E,F,G,H and S . Don't include amounts reported in code DD.	
	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1 – Total of lines 15 + 19	
	Child support received for all children. Do not include foster care or adoption payments.	
	Tax exempt interest income from IRS Form 1040 – Line 2a	
	Untaxed portions of IRA distributions and pensions from IRS Form 1040 – (lines 4a + 5a) minus (lines 4b+5b). Exclude rollovers . If negative, enter zero here.	
	Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing (BAH/BAQ).	
	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	
	Other untaxed income not reported, such as workers' compensation, disability benefits, etc. Also, include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1 – Line 12. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay (if your parents are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.	
	 Totals 	

Student's Name: _____ SSN: _____

E. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Spouse's Signature

Date

STOP! Are all boxes filled in? Did you sign the form? Thank you!

*Submit this worksheet to the financial aid office at
The College of New Jersey (TCNJ)
PO Box 7718, Ewing, NJ 08628
Green Hall 101 (609) 771-2211 - Fax (609) 637-5154*